

# **Achieving Success With CATS**

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## Objectives

- Understanding State's requirements for project execution and management
- Applicable policies, processes and requirements
- Success with CATS
- Roles and responsibilities

## State ITMP Strategic Initiatives

1. Establishment of technical standards and enterprise architecture
2. Further development of professional project management
3. Establishment of a consolidated and enhanced disaster recovery site
4. Complete building and migration to networkMaryland™
5. Consolidation of common information platforms
6. Consolidation and standardization of agency web sites
7. Modernization of core statewide business systems
8. Interoperability of wireless public safety communications systems

## Characteristics of Successful Projects

- Strong Executive sponsorship
- Appropriate level of responsibility, authority and resources are assigned
- Effective management of project resources
- Prescribed processes and methodologies are employed
- Project team adheres to prescribed processes and methodologies
- Functional users of the resulting system are involved throughout the project
- Effective project oversight is utilized to proactively identify and adjust for increased project risk

# Maryland's Project Requirements

- Strategic Planning
- System Development Life Cycle (SDLC)
- Enterprise Architecture
- IT Security Policy and Standards
- Project Management Oversight

## Strategic Planning

- Agency IT Master Plan
- Consistent with applicable State initiative(s)
  - Consistent with the business plan of the agency
  - Justified business case
- Managing For Results
- IT Project Request (ITPR)
- Agency budget development and submission

# Project Management Oversight

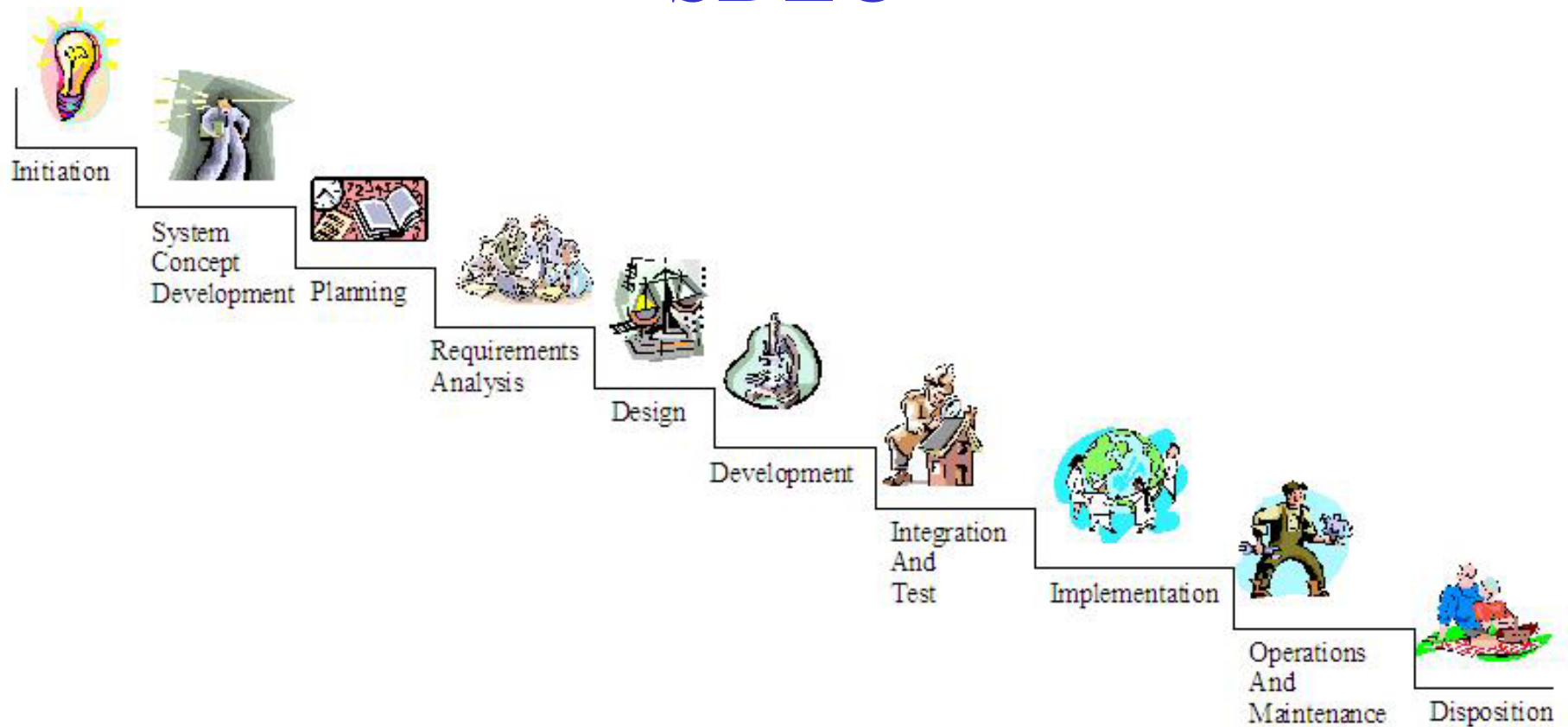
- 4 Tier Oversight Methodology
  - Agency
  - DBM
  - Peer Review
  - Independent Verification and Validation (IV&V)
- Specific requirements are predicated on project risk profile

## SDLC

- System Development Life Cycle
  - Foundation for all projects
  - Flexible framework to structure and manage nearly every type of project
  - Consists of 10 phases, from initiation to retirement



# SDLC



# Technology Requirements

- Each project is unique. However,
  - Must consider and be consistent with Maryland Technology Architecture Framework (MTAF)
    - Technology Reference Model (TRM) developed
    - Systems inventory currently under way
    - Ability to identify technologies and systems in use at other agencies
    - Will become more integrated into strategic planning and investment decisions

# IT Security Policy and Standards

- State is very sensitive to IT security
- Version 1.3 recently released
  - Primary areas of change:
    - Added terms and definitions: IPS, Untrusted Network, VoIP
    - Software Code of Ethics (paragraph 12.2) incorporated
    - Format consistency

## Other Considerations

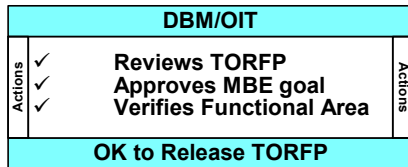
- PMI Project Management Body of Knowledge
- Project specific State and federal requirements
- Agency operating environment
- Funding

## CATS TORFP Process

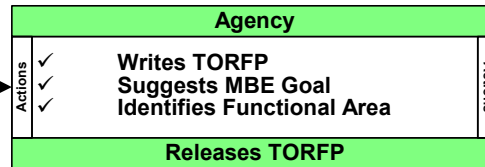
- Different from past Master Contracts
  - Primary responsibilities for solicitation and selection fall to the agencies
  - DBM's role is primarily oversight, final approvals and master contract management

# TORFP Roles and Responsibilities

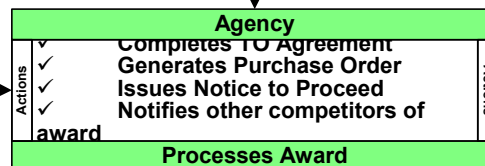
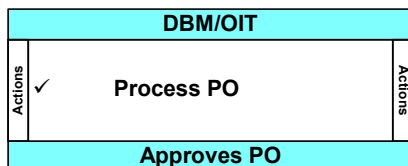
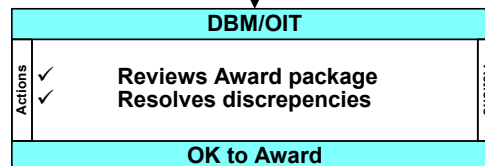
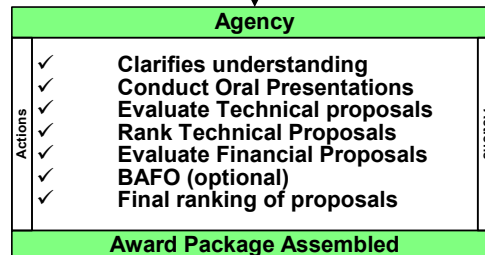
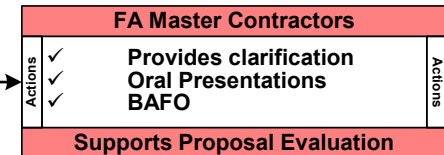
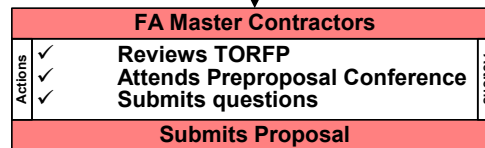
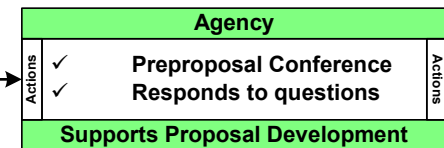
## Approvals



## Primary



## Supporting



# Successful Engagements

- Quality TORFP and Quality proposals
- Open and frequent communication
- Effective project management
- Effective contract management
  - Agency for TO Agreement
  - DBM for Master Contract
- Quality, quantifiable deliverables
  - On Time and On Budget
  - Meets functional and technical requirements
- Issue Resolution
  - Proactive
  - Escalation

# Partners Share Risk and Reward

- Risk:
  - Multiple deliverables
  - Retainage
  - Draft deliverables in advance of finals
  - Limits of liability
- Reward
  - Happy clients
  - Happy stakeholders





**Thank You!**